Social Assistance Management System (SAMS)

Software Help Sheet 20:

III-E FCSP/ FCSP(G) Registered Service Delivery

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Author:	Jaime Morales
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Background

The California Aging Reporting System (CARS) was instituted by the California Department of Aging, (CDA) on July 1, 2008. This new system was implemented to gather the detailed client and service data required for the National Aging Programs Information System (NAPIS).
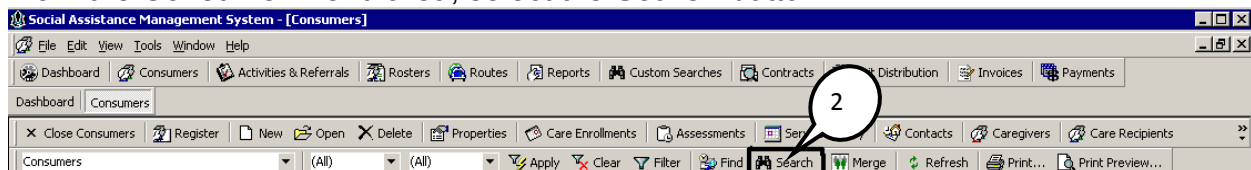
Part One: Enter Client Intake Information

Entering client demographic data prior to delivering services

1. From the SAMS main menu, select the **Consumer** button.
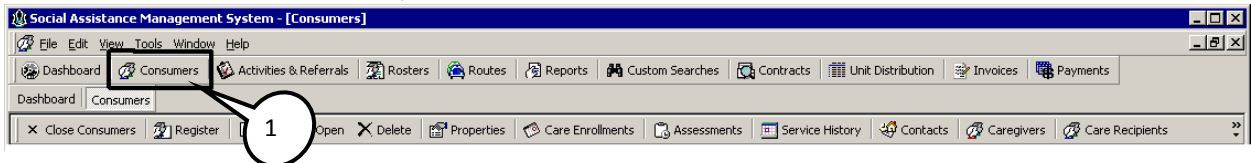
2. From the Consumer menu area, select the **Search** button.

3. The Search Consumers window will appear. Use the search function to determine if the consumer is already in SAMS by (3a) entering appropriate search criteria, and then (3b) selecting the **Find** button.
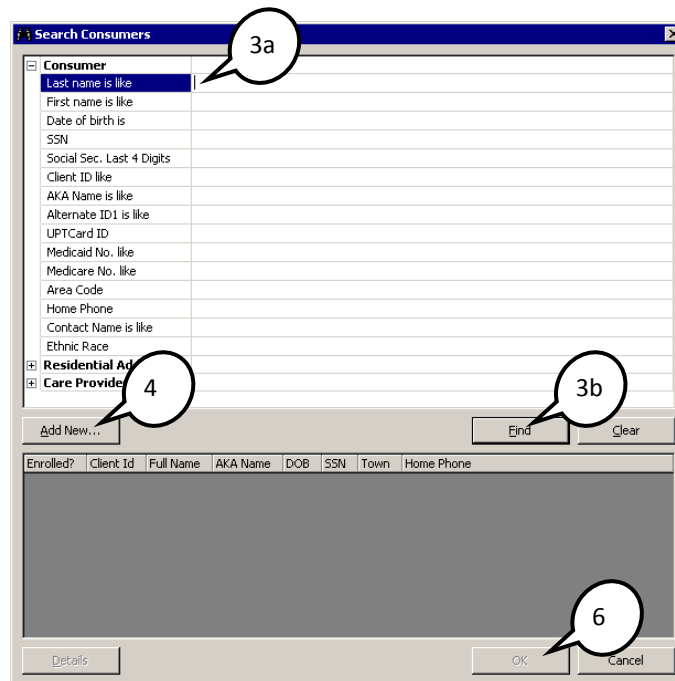
4. If the consumer is not found, select **Add New …** (consumer) button otherwise proceed to step 6.

5. Fill out the required Client Intake Information.

6. If the Consumer is found, select the consumer then select the **OK** button and move on to Part Two to do the Care Enrollment.

Part Two: Care Enrollment

Once the consumer is created or found, enroll the consumer into a care program.

7. Select **Care Enrollments** from the Consumer Details sub-menu.

8. Click on the **Add Care Enrollment** button to have the **Add Care Enrollment** window appear. Complete this as you would for any care enrollment. **Please note SAMS cannot attach a care enrollment for a period prior to the contract start date.** Also the "Application Date", "Received Date", "Status Date" and "Start Date" have to be the same and must reflect the instance when the enrollment should have started for the consumer.

9.   Click OK.

PART III: Registering a Care Recipient

Linking a Care Recipient to a Caregiver is needed prior to delivering services. Once Caregivers and Recipients are linked, then a specific Service Delivery can be directly associated with a recipient.

10.   Click on **Care Recipients** from the Consumer Details sub-menu.

11.   From the Consumer Menu, select **Add Care Recipient**.

12.   Click on the **Browse** button to have the Search Consumer window appear.

13.   Fill in Care Recipient identifying information to search for an existing consumer or to ensure a consumer is not already in SAMS.
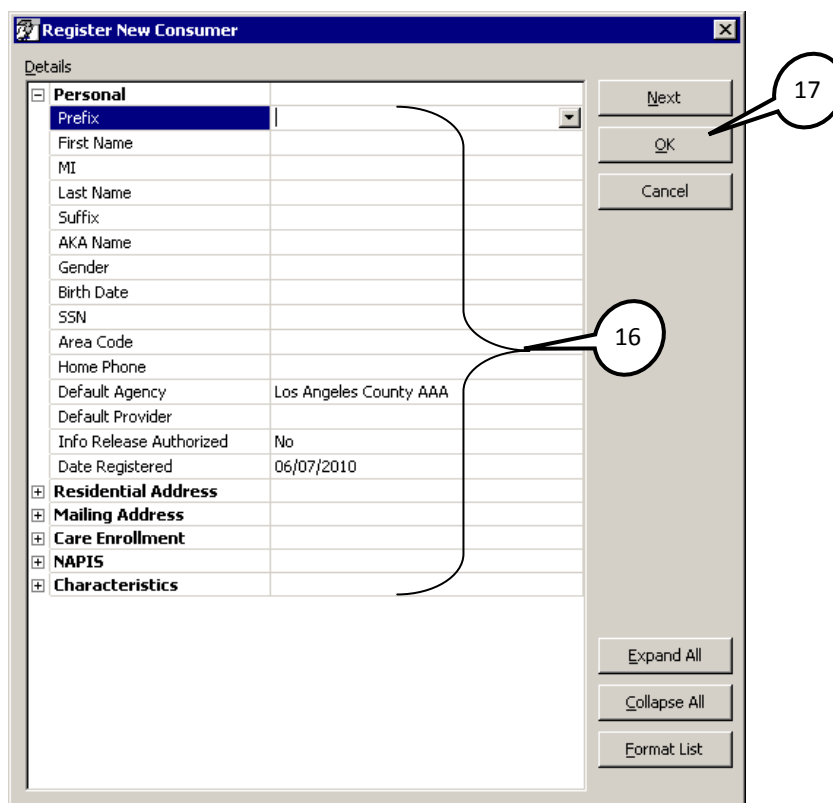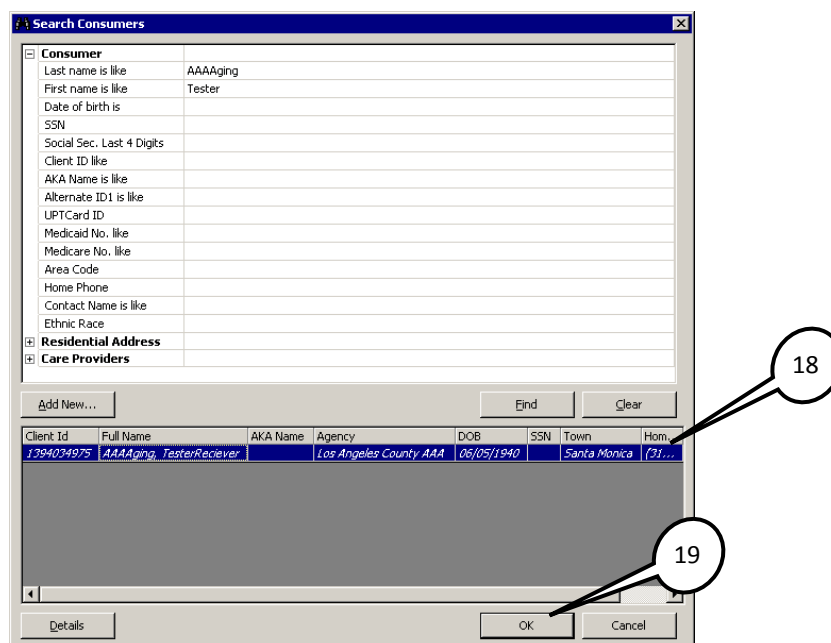
14.   Click on the **Find** button.

15.   If the consumer cannot be located within SAMS, click **OK** on the pop up screen and proceed to step number 16. If consumer is located, then proceed to step 18.

16. Fill in all relavent consumer information including the proper Default Provider as well as the Date Registered.

17. Click on **OK** to add the consumer to SAMS. Do not click on Next as this will prompt you to add more consumers onto SAMS.

18.   Ensure the correct consumer is highlighted.

19.   Click on the **OK** button.

20.   When the Add Care Recipient window re-appears, click on the **Relationship To Care Recipient** field to select the appropriate relationship.

21.   Ensure that the **Start Date** is correct.

22.   Click on the **OK** button to create a link between the Caregiver and Care Recipient.

23. The Sample Display demonstrates a care recipient successfully linked to a caregiver.

PART IV: Delivering a service tied to Care Recipient

The example illustrates a III-E registered Supplemental Services linked to a Care Recipient. This process works for any registered service that requires a linked consumer.

24. Select **Service Delivery** to add a service to the selected consumer.

25. Select Family Caregiver Support Program as the **Care Program**.

26. Select Supplemental Services as the **Service Category**.

27. Select the appropriate **Service.**

28. Enter III-E as the **Fund Identifier**.

29. Enter yourself as the **Provider**.

30.   Select the **Care Recipient** from the dropdown list*****.

31.   Enter the dollar amount in the **Unit Price** (the example has $123.45).

32.   Click on **Daily Unit Details** to enter the number of units on the appropriate day.

33.   Select **Save and Close** from the menu.

∗   Note that every service being provided to a Care Recipient by a Caregiver must have a Care Recipient specified on line number 16.